MEMORANDUM FOR THE GSA ACQUISITION WORKFORCE

FROM: JEFFREY A. KOSES, SENIOR PROCUREMENT EXECUTIVE
OFFICE OF ACQUISITION POLICY (MV)

SUBJECT: IN-depth Feedback through Open Reporting Methods (INFORM) Pilot

1. Purpose.

This letter provides guidance for the IN-depth Feedback through Open Reporting Methods (INFORM) pilot.

2. Background.

GSA has a long-term interest in improving and increasing industry communication. Recent efforts include hosting a series of reverse industry days, reducing regulatory burdens, and sharing best practices. By improving the quality and usefulness of post-award communication, offerors have a clearer understanding as to why they did or did not receive an award.

Section 818 Enhanced post-award Debriefing Rights of the National Defense Authorization Act for Fiscal Year 2018\(^1\) (FY18 NDAA) requires the Department of Defense (DoD) to enhance the debriefing rights of unsuccessful offerors. These rules also apply when GSA does assisted acquisition for DoD. Several civilian agencies implemented enhanced debriefing procedures to improve the quality of post-award communication. The INFORM pilot will let GSA test run an enhanced postaward feedback program specific to our needs but consistent with DoD practice.

3. Authority.

The INFORM pilot satisfies the requirements of the DoD Class Deviation 2018-O0011.\(^2\) The INFORM pilot exceeds the minimum requirements for feedback listed in:

- FAR 8.405 (Ordering Procedures for the Federal Supply Schedules)
- FAR 15.503 (Notifications to Unsuccessful Offerors), and
- FAR 15.506 (Post-award Debrief of Offerors)

\(^1\) National Defense Authorization Act FY2018
\(^2\) DOD Class Deviation 2018-O0011
4. Effective Date.

The pilot program begins on October 12, 2018.

5. Applicability.

Each Head of Contracting Activity (HCA), in FAS, PBS, and OAS has identified at least two FAR-based procurements to include in the INFORM pilot test group and an equal number of similar control group projects. Eligible procurements were:

- Planned to be solicited and awarded in Fiscal Year 2019
- Competitive (i.e. anticipate more than one offer)
- Following FAR parts 8, 12, 15, or 16, and
- Based on best-value award decisions excluding Lowest Price Technically Acceptable

The Office of Acquisition Policy (MV) reviewed proposed procurements to ensure that the pilot covers a wide variety of projects (e.g., dollar threshold, complexity, FAR Part, category (e.g. construction, O&M, IT, services, professional services, products), and business size). MV will provide the HCAs a written confirmation for the procurements included in the INFORM pilot.

6. Requirements.

The INFORM pilot program should be embedded through several phases of the acquisition lifecycle - acquisition planning, solicitation, evaluation, award, and post-award. Each is summarized below and more fully explained in the INFORM Guide, available on the Acquisition Portal. The INFORM pilot program is designed to provide a standard enterprise-wide approach.

- **Solicitation Phase**
  Use the standardized solicitation language found on the INFORM topic page. Plan for your enhanced postaward feedback opportunities. Ensure evaluation factors are easy to use and explain.

- **Evaluation Phase**
  Document your evaluation in a manner that you are comfortable releasing the portion relating to the requestor in an un-redacted manner.

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3 Waivers will require approval from the respective Service Commissioner and the SPE.

4 Acquisition of commercial items pursuant to FAR 12 that are conducted using the evaluation and award procedures prescribed in FAR 15 and 16 are included in the INFORM pilot.
• **Award Phase**
  Update the notification letter template to include a customized evaluation statement explaining the offeror’s strengths and weaknesses. Template letters are located on the INFORM topic page on the Acquisition Portal to simplify the notification requirement.

• **Post-Award Phase**
  Afford additional opportunities for communication. The notification letter provides the offeror with both the opportunity to request a post-award oral feedback meeting and the opportunity to submit written questions. A suggested format for the oral feedback meeting is provided on the INFORM topic page on the Acquisition Portal.

  In-person meetings are preferred, though other methods are acceptable. Following the oral feedback meeting, offerors will be given an additional two business days to submit any follow-up questions.

• **Reporting**
  Because this is a pilot program, reporting results is essential before making a decision on whether/how to implement the pilot on an agency-wide basis. The acquisition team for each INFORM pilot procurement is required to submit an INFORM data collection form within 30 days of contract award using the online submission process. The form is located on the INFORM topic page on the Acquisition Portal.

8. **Legal Reviews.**

Legal reviews and concurrences are required prior to issuing the notification letter or sending answers to offeror’s written questions. Engage with the Office of General Counsel early in the acquisition process to discuss the legal support needed under the INFORM pilot program.

9. **Pilot Metrics.**

MV will assess the effectiveness of the INFORM pilot on GSA’s post-award communications and industry perceptions of GSA’s evaluation and selection process. The specific areas to be assessed are:

- **Quality**: The extent to which post-award communications are perceived by industry as being: clear, concise, thorough, candid, and in plain language.
- **Usefulness**: The extent to which the offeror believes the post-award communications will improve its future procurement approach (bid/no-bid decision, capture strategy) and proposal preparation (technical, past performance, and pricing approach).
- **Fairness**: The extent to which the evaluation procedures are perceived as: consistent, free of bias, independent, professional, and timely.
Financial Implications: The burden (acquisition, technical, and legal personnel time) to GSA associated with preparing and delivering post-award communication elements.

Acquisition Timeline Implications: The impact on procurement acquisition lead time to GSA associated with providing post-award communications.

To assess the pilot, OGP will collect data for the INFORM pilot test group procurements and control group procurements. Data sources will include industry surveys, GSA workforce reports, and electronic acquisition systems. Additional details on the INFORM pilot metrics can be found on the Acquisition Portal.

10. Point of Contact.

Any questions regarding the content of this Letter may be directed to Johnnie McDowell at johnnie.mcdowell@gsa.gov, Procurement Analyst, General Services Acquisition Policy Division.

11. Resources.

The following resources are available on the INFORM topic page on the Acquisition Portal.

- INFORM Procurement List
- INFORM Guide
- INFORM Solicitation Language
- INFORM Notification Letter Templates
- INFORM Oral Feedback Meeting Format
- INFORM Metrics